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Exhibit 300 Assessment and Reporting in WorkLenz

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Analyzing an Exhibit 300 in WorkLenz

This WorkLenz guide outlines the process for analyzing an Exhibit 300 in WorkLenz. This includes reviewing Exhibit 300 answers and analyzing the scores using the *Exhibit 300 Scoring Report*. Use this guide in conjunction with the WorkLenz Version 4.5 Training Guide to learn about project portfolio management in WorkLenz.

Before beginning, below is an overview of the taxonomy, or structure, of United States Department of Agriculture (USDA) data in WorkLenz. This structure will help you identify the appropriate level in WorkLenz at which to find your investments.

Portfolio level in WorkLenz	U.S. Department of Agriculture
Program level in WorkLenz	Agency Offices
Project level in WorkLenz	Investments

Accessing WorkLenz

WorkLenz can be accessed at http://worklenz.usda.gov. Log into WorkLenz using your assigned login and password. Your login is the first initial of your first name and your last name. For example,

Name: Brenda Smith
Login: bsmith

Your initial password is '**password1**.' You will be prompted to change your password after logging in for the first time.

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Reviewing the Exhibit 300 in WorkLenz

1. After logging in, the splash screen will be displayed for a few seconds and you will be taken to the portfolio summary screen (Figure 1). Click on the project icon to view the project list screen.

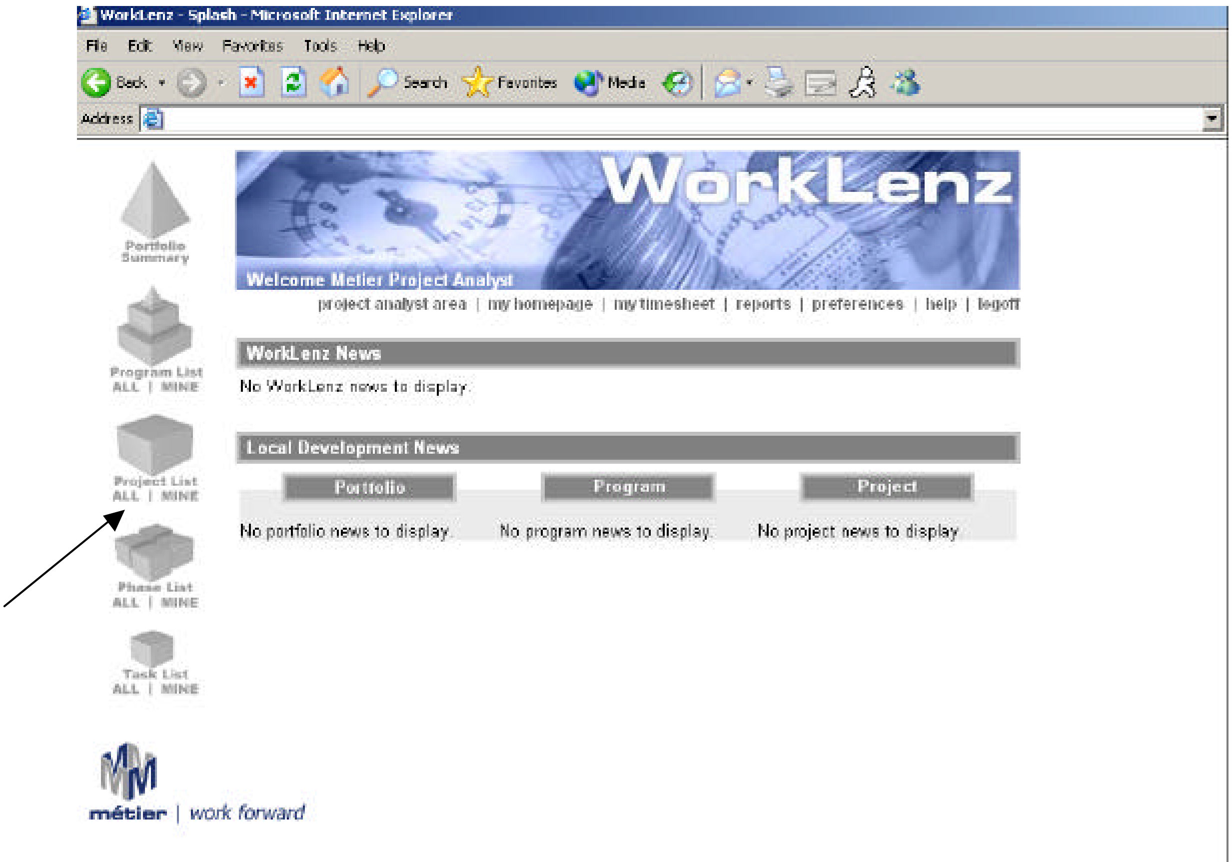

Figure 1

2. Select an investment by clicking on the investment name. You will be directed to the project summary screen for that investment (Figure 2). Click 'Admin' in the Actions bar.

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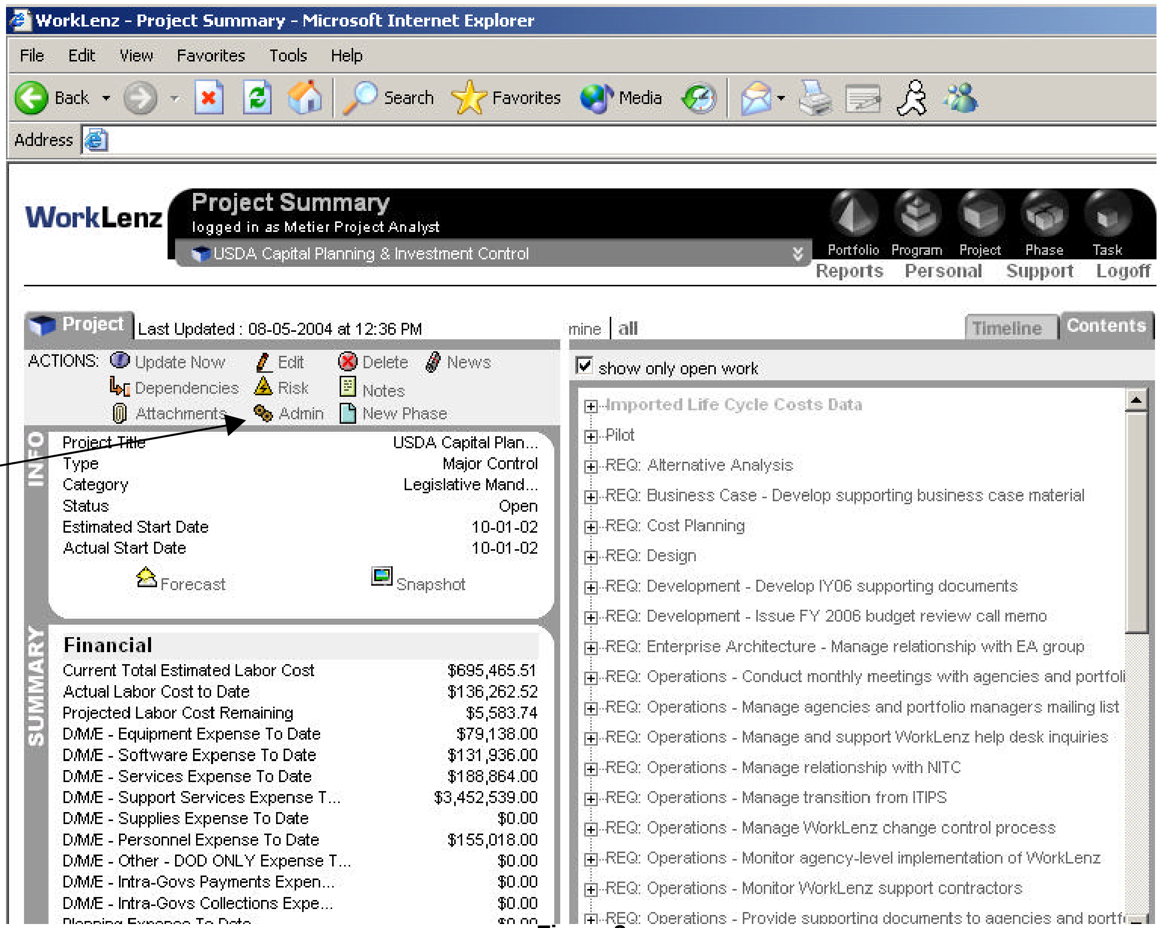

Figure 2

3. From the administration screen (Figure 3), click the 'Assessments' link to view the assessment list screen. WorkLenz uses assessments to create questionnaires about projects. The Exhibit 300 is one of many assessments available in WorkLenz.

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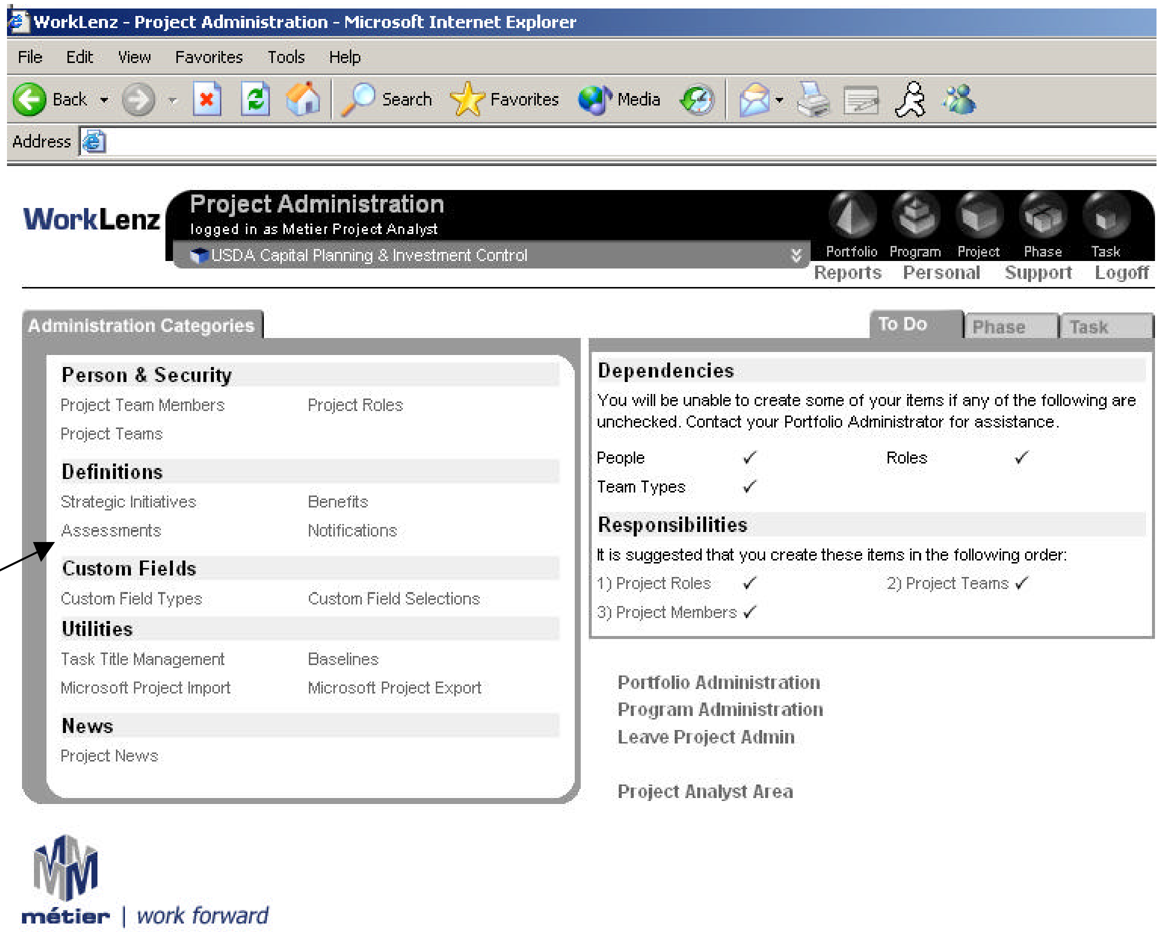

Figure 3

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4. Click the ‘Exhibit 300 FY2006’ link to view the Exhibit 300 answers.

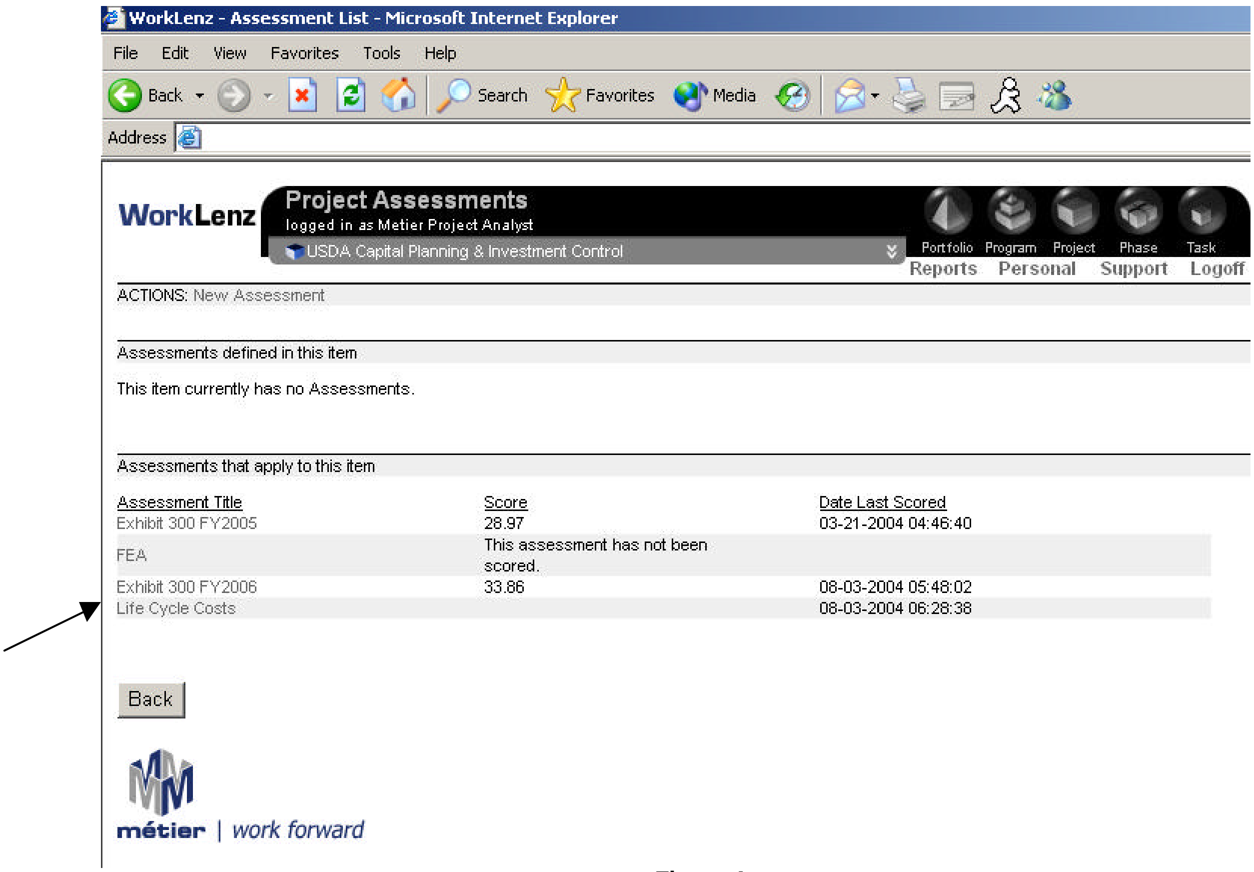

Figure 4

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There are a number of functionalities for the Exhibit 300 assessment

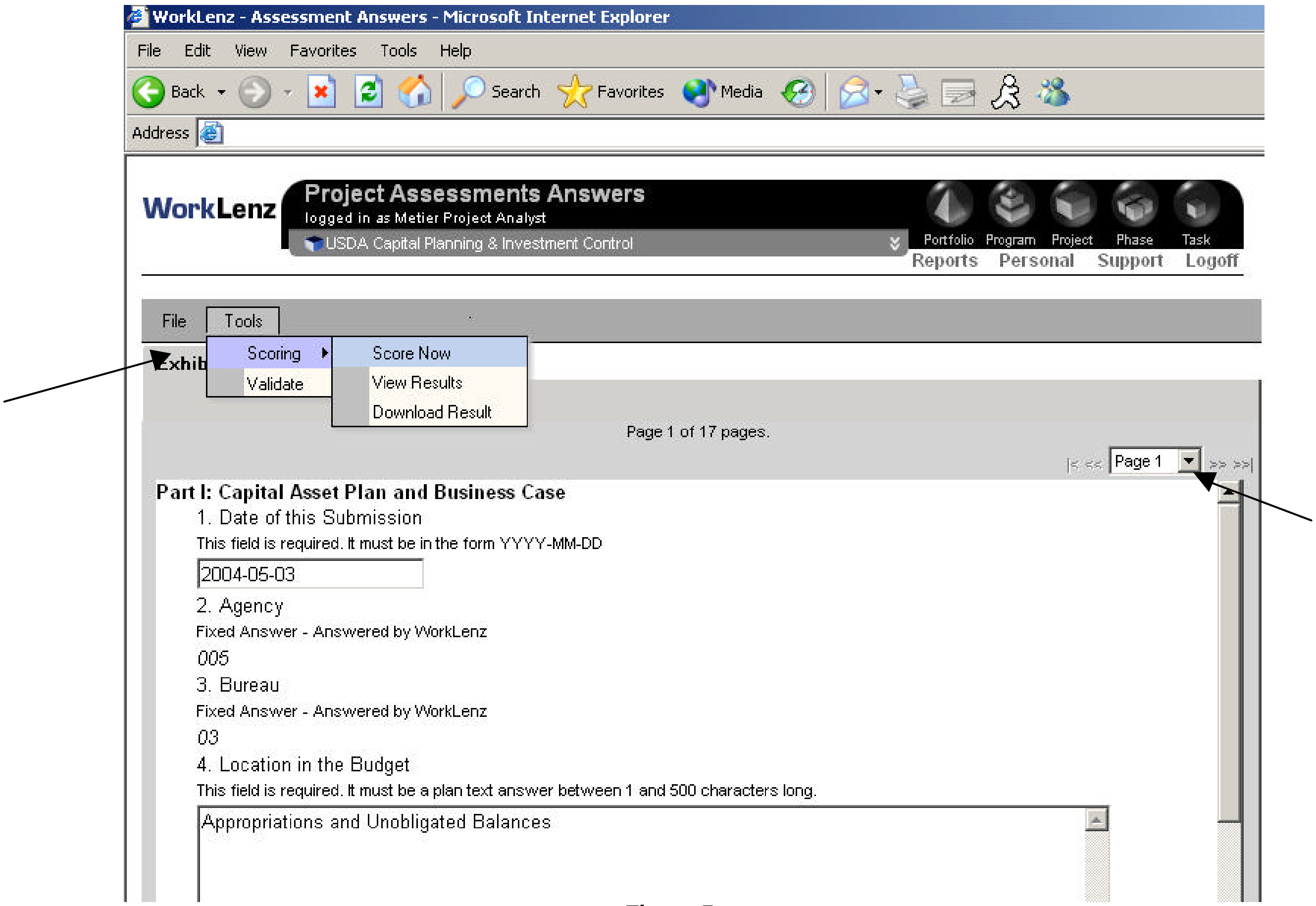

Figure 5

5. The functionalities under “File” include saving both the assessment page and the entire assessment, printing and exiting the Exhibit 300

6. The functionalities under “Tools” include pre-scoring, validating the data, and outputting an html or xml version of the Exhibit 300.
   a. Pre-scoring: Run a series of algorithms that provides a preview of the score OMB and OCIO will provide to the investment.
   b. Validate: Assure the data (answers to each question) is in the proper format for submission to OMB.

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c. Output: Provides an HTML or XML version of the Exhibit 300 business case. Note: HTML output converts the answers to text format answers; therefore, paragraph tabs and special characters are stripped out. All the information will still appear in its original format to OMB.

7. In the upper righthand side, there is a dropdown list to navigate the pages of the Exhibit 300. A list of the contents of each page is in the appendix.

8. Exhibit 300 Questions: There are three types.
    a. Fixed Answer: Select an answer from a dropdown list
    b. Essay Format. Open-ended questions that allow an essay formatted answer.
    c. Tables: For all the tables, you select the number of rows. If you want to edit a table, simply change the number of rows and click “refresh.” All new rows will be added to the bottom of the table. All deleted rows will be taken from the bottom. Rows cannot be inserted or deleted from in between two rows.

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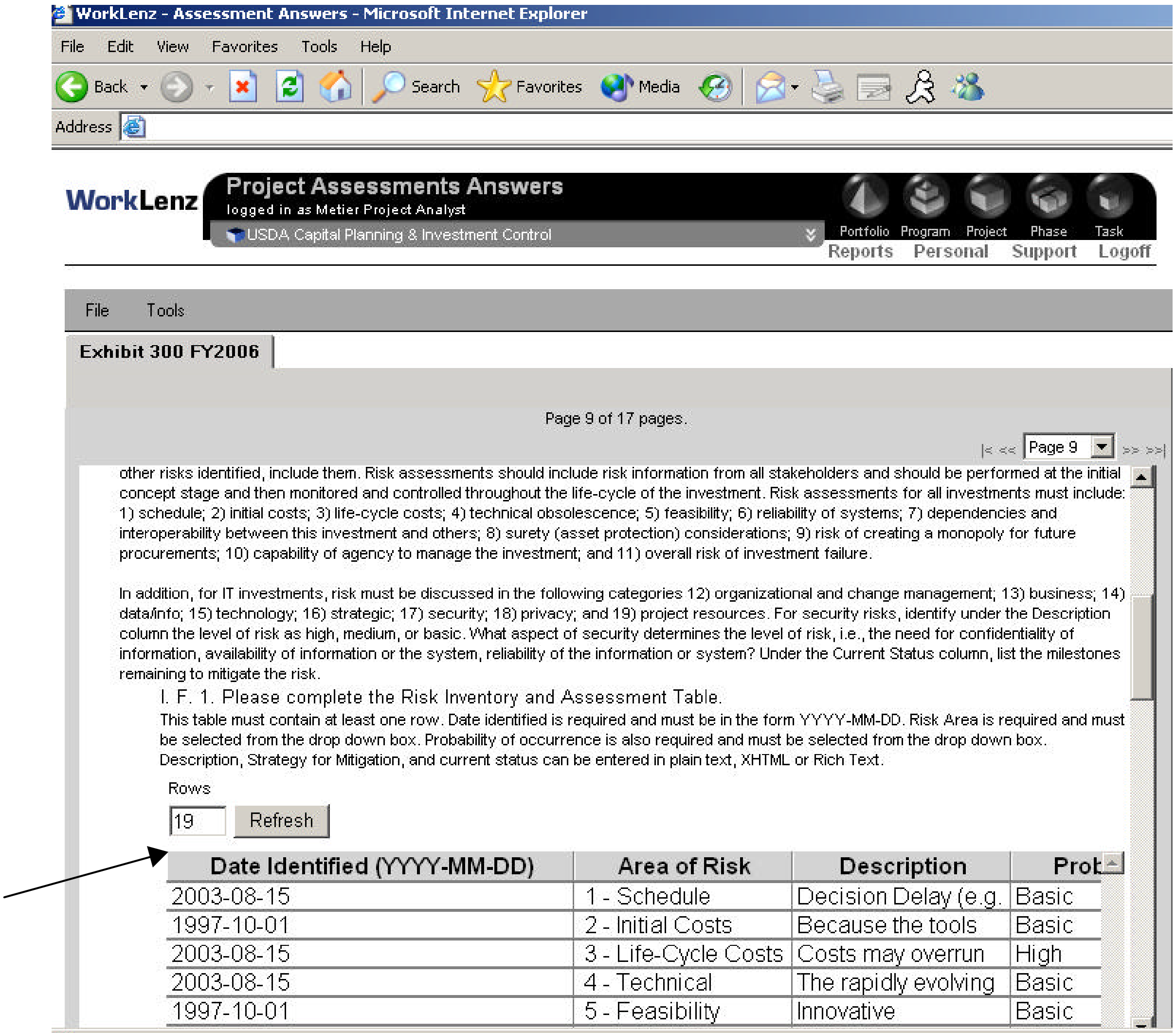

Figure 6

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Using the *Exhibit 300 Investment Scoring Report*

1. Click the 'Reports' link in the utility menu (Figure 4) to launch the Report Center. This menu is available on the splash screen (the first screen seen after logging in) or the upper right hand corner summary screens.

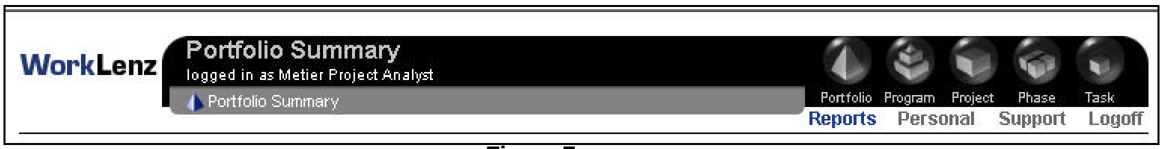

Figure 7

2. The Report Center will open in a second browser window. The *Exhibit 300 Investment Scoring Report* is available at the portfolio, program and project levels. Select the level you would like to begin at by clicking on the appropriate tab (Figure 5).

Figure 8

3. Expand the 'Performance' link and the 'Custom USDA' link to select the *Exhibit 300 FY2006 Scoring Report* (Figure 9).
   d. Portfolio level – Click 'work forward.'
   e. Program level – Select a program office and click 'work forward.'
   f. Project level – Select a program office and an investment and click 'work forward.'

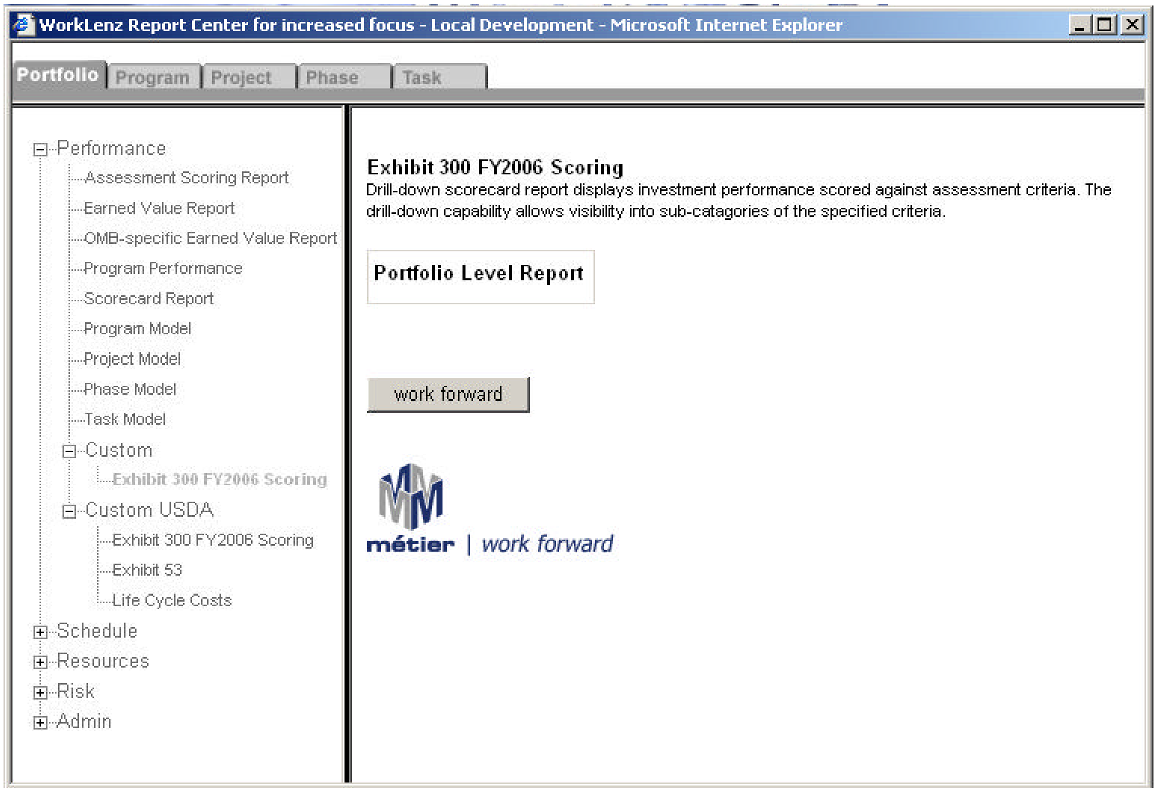

Figure 9

4. The report uses green, yellow and red bubbles to indicate performance from the program office level down to the question level. Click on the section that you would like more detail on to drill down a level in the report (Figure 10).

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Overall score

		Project Score	Date Last Scored
Overall		34.32	08/03/04

View legend

Score breakdown

		Section Score	Agency Average	Department Average
President's Management Agenda		2.50	2.50	3.59
Performance Goals		3.60	3.60	3.20
Project Management		3.43	3.43	3.45
Alternative Analysis		4.54	4.54	3.87
Risk Management		4.75	4.75	4.01

Figure 10

5. The Agency Average represents the average score for all investments that fall under the particular USDA agency. Similarly, the USDA Average represents the average score for all USDA investments.

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Appendix

Order of the Exhibit 300 in the Portfolio Assessment Engine

Pages 1 through 5 of the Exhibit 300 contain questions designed to collect general background information about the investment.

Section I.B. of the Exhibit 300, ***Justification***, begins about halfway down page 5 and concludes on page 6.

Section I.C. of the Exhibit 300, ***Performance Goals and Measures (All Assets)***, begins at the bottom of page 6 and concludes on page 7.

Section I.D. of the Exhibit 300, ***Project Management (Investment Management)***, begins in the middle of page 7 and concludes on page 8.

Section I.E. of the Exhibit 300, ***Alternatives Analysis***, begins on page 8 and concludes on page 9.

Section I.F. of the Exhibit 300, ***Risk Inventory and Assessment***, begins in the middle of page 9 and concludes at the bottom of page 9.

Section I.G. of the Exhibit 300, ***Acquisition Strategy***, begins at the bottom of page 9 and concludes on page 11.

Section I.H. of the Exhibit 300, ***Project (Investment) and Funding Plan***, begins at the top of page 11 and concludes on page 13.

Section II.A. of the Exhibit 300, ***Enterprise Architecture***, begins at the top of page 14 and concludes on page 16.

Section II.B. of the Exhibit 300, ***Security and Privacy***, begins on page 16 and concludes on page 17.

Section II.C. of the Exhibit 300, ***Government Paperwork Elimination Act (GPEA)***, begins on page 17 and is the last section of the Exhibit 300.

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